



# Montgomery County's Benchmarking Law

## What's Data Verification and How Do I Do It?

In April 2014, Montgomery County passed a benchmarking and transparency law ([Bill 2-14](#), and amended with [Bill 35-15](#)), requiring the County and building owners to benchmark energy use in certain nonresidential buildings of 50,000 square feet or greater.

Building owners need to benchmark their data using the [ENERGY STAR® Portfolio Manager®](#) tool, have those data verified by a Recognized Data Verifier, and disclose those data to Montgomery County's Department of Environmental Protection (DEP). Step-by-step help on how to benchmark and report is available in [DEP's Official Guide to Benchmarking](#).

### What is data verification?

Verification is considered an industry best practice, and ensures that building and energy data entered into Portfolio Manager are accurate. The purpose of verification is to enhance the quality of data being reported collectively through the Benchmarking Law and ensure data is accurate and useful to the building owner and staff. Verification requires a second pair of eyes from someone with knowledge about Portfolio Manager and building energy performance.

### Who can do verification?

To comply with the law, a **Recognized Data Verifier** must complete the verification of benchmarking data. A Recognized Data Verifier is a professional with a current verification credential that is recognized and approved by the DEP Director. The full list of acceptable credentials is available on [DEP's Benchmarking website](#) (see Step 3: Data Verification).

### Can I use my building's ENERGY STAR certification?

Yes. As an alternative to data verification, building owners can meet the verification requirement if the building has achieved the ENERGY STAR building certification for at least 6 months of the calendar year being benchmarked. If using this verification path, please indicate this in the Property Notes field by stating "ENERGY STAR Certification used for verification" and the month and year certification was achieved.

## How often must verification be completed?

Buildings are required to have their Portfolio Manager data verified by a Recognized Data Verifier during the **first year of reporting** and **every three years after** by the annual June 1<sup>st</sup> benchmarking deadline.

Montgomery County Benchmarking Law Reporting Cycle					
Building Group	CY 2014 Data	CY 2015 Data	CY 2016 Data	CY 2017 Data	CY 2018 Data
County Buildings	Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report	Benchmark, Report
Group 1 (250,000 SF+)		Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report	Benchmark, Verify, Report
Group 2 (50,000 SF up to 250,000 SF)			Benchmark, Verify, Report	Benchmark, Report	Benchmark, Report

## How long does verification take?

Completing verification on a building should not be too time-consuming, unless it is a large building with many meters and/or tenants, or there are multiple buildings on a campus. DEP estimates that verification should take 1-2 hours to complete on an average-sized building. Site visits are optional, which should also cut down on the time required.

## How expensive is verification?

The cost of verification is determined between the building owner and the Recognized Data Verifier. In some cases, benchmarking and verification services may be included as part of a larger energy service offering. In other cases, the cost may be determined by the size and complexity of the building. The Benchmarking Law does not set a rate for verification, nor does DEP.

*For non-profit building owners:* DEP is piloting a pro bono verification program for non-profit building owners only. This program is offered on a first-come, first-served basis, thanks to the select Benchmarking Ambassadors who have volunteered their time. Non-profit building owners who take advantage of this program will be transparently listed on DEP's website. [Contact DEP](#) for more information and to request a questionnaire.

## If I'm a building owner, how do I get my data verified?

After all of the building characteristic and energy data have been entered into Portfolio Manager, verification is fairly simple! Below is a step-by-step guide for building owners:

### Step 1 – Find a Recognized Data Verifier

You'll need to find a professional who holds one of the acceptable credentials on [DEP's Benchmarking website](#) (see Step 3: Data Verification). This person can be someone on your staff, or you may need to look for an outside professional/firm who can provide this service.

### Step 2 – Assist with the verification process

A Recognized Data Verifier may need you to provide access to your Portfolio Manager account, utility bills, drawings, and occupancy information to complete verification. He or she may also request a site visit, depending on data available electronically and the complexity of the building.

Not sure how to find a Recognized Data Verifier? DEP's [Benchmarking Ambassadors list](#) is a great place to start. These individuals—many of whom have acceptable Recognized Data Verifier credentials—attended a training taught by EPA ENERGY STAR Portfolio Manager Staff, which included details about complying with the law and information on accessing data from utilities.

After verification is complete, the Recognized Data Verifier will review any errors or inconsistencies found with you and discuss how to resolve them. This is an important step of the process so you'll be equipped to benchmark your building in future years!

### Step 3 – Show that you've completed verification

In Portfolio Manager, either you or the Recognized Data Verifier will need to enter the credential information in the Property Notes field on the Details tab. This should include: the calendar year of data that was verified, full name of the Recognized Data Verifier, credential he/she holds (name/acronym), credential ID number (if available), and email and phone number of the Data Verifier. Remember to click Save when you've finished.

### Step 4 – Submit benchmarking report to DEP

Every year, DEP provides a reporting link to facilitate electronic reporting through Portfolio Manager. Note, there is a new reporting link for each compliance year. Determine whether you will complete the reporting process after verification, or if the Recognized Data Verifier will submit it on your behalf. Benchmarking reports are due on June 1<sup>st</sup> annually.

### Step 5 – Keep records

Building owners should hold onto the most recent copy of the completed Data Verification Checklist after submitting your benchmarking report to DEP.

## If I'm the Recognized Data Verifier, how do I complete verification?

Before getting started, please make sure your credential is current and that you are in good standing with the credentialing institution. Below is a step-by-step guide for Recognized Data Verifiers:

### Step 1 – Work with the building owner to collect all data you may need

To start, connect with the building owner as a contact within Portfolio Manager ([instructions available from EPA](#)). The building owner will provide you with either read-only or read-write access to the property ready for verification.

Run the Data Quality Checker to ensure all data have been entered for the calendar year being verified; notify the building owner of any gaps and have he or she locate and enter any missing bills. At this time, also ask for other documentation you'll need to complete verification, such as utility bills, drawings, and occupancy information.

### Step 2 – Review the data using the ENERGY STAR Data Verification Checklist as a guide

Once you have all the supporting information from the building owner, you can start reviewing the Portfolio Manager property record using the ENERGY STAR Data Verification Checklist as a guide. The Data Verification Checklist is a form customized to the building you're verifying that you can download from the Reporting tab within Portfolio Manager ([sample available here](#)).

Check off each section as you review it for correctness, as well as whether the data accurately represents the building you are verifying. For Benchmarking Law verification, you can omit the water and indoor environmental standards sections. If any "No" boxes are checked, resolve this issues with the building owner before submitting the benchmarking report to DEP.

The screenshot shows the ENERGY STAR Data Verification Checklist for a sample property. The top section features the ENERGY STAR logo and a large score of 86. Below this, property details are listed: Primary Function: Office, Gross Floor Area (GFA): 200,000, Built: 1980, For Year Ending: 04/30/2013, and Date Generated: 06/25/2013. A small note explains that the ENERGY STAR score is a 1-to-100 assessment of a building's energy efficiency. The form is divided into sections for Property & Contact Information and 1. Review of Whole Property Characteristics. The first section includes fields for Property Address, Property Owner, and Primary Contact. The second section, titled 'Basic Property Information', contains three numbered questions with 'Yes' and 'No' checkboxes. Question 1 asks if 'Sample Property' is the official name. Question 2 asks if 'Office' is an accurate description of the primary use. Question 3 asks for the location, which is listed as 123 Main Street, Arlington, Virginia 22030.

Property & Contact Information		
<b>Property Address</b> Sample Property 123 Main Street Arlington, Virginia 22030 Property ID: 5000023	<b>Property Owner</b> Vedding Commercial Property Managers 1 Washington Blvd Arlington, VA 22030 ( ) ( ) ( )	<b>Primary Contact</b> Jane Smith 1 Washington Blvd Arlington, VA 22030 ( ) ( ) ( ) jsmith@veddp.com

**1. Review of Whole Property Characteristics**

**Basic Property Information**

1) **Property Name:** Sample Property  
Is this the official name of the property? ☐ Yes ☐ No  
If "No", please specify: \_\_\_\_\_

2) **Primary Function:** Office  
Is this an accurate description of the primary use of this property? ☐ Yes ☐ No

3) **Location:**  
123 Main Street  
Arlington, Virginia 22030 ☐ Yes ☐ No

### **Step 3 – Complete and sign the Data Verification Checklist**

The Data Verification Checklist has a box on the last page where a PE or RA stamp is required. The stamp is required only if the building owner is seeking ENERGY STAR Certification – however, as the Recognized Data Verifier, make sure your name, date, and signature appear on this final page. The signed Data Verification Checklist should be returned to the building owner—please advise him or her that they must keep this signed document on file until the next data verification process is completed.

**Pro tip:** Building owners can also use this checklist for ENERGY STAR certification. To do that, they'll need to work with a PE or RA and complete the full checklist.

### **Step 4 – Enter your credential information into Portfolio Manager**

In Portfolio Manager, either you or the building owner will enter the credential information in the Property Notes field on the Details tab. This should include: the calendar year of data that was verified, full name of you, the Recognized Data Verifier, the credential you hold (name/acronym), credential ID number (if available), and email and phone contact information. Remember to click Save when you've finished.

Then, determine whether the building owner will complete the reporting process after verification, or if you will submit the report on their behalf. Benchmarking reports are due on June 1<sup>st</sup> annually. During the reporting process, Portfolio Manager will ask whether the report is being submitted by you or on behalf of someone else – at that time, you would select the building owner's name from the pre-set dropdown menu.

### **Step 5 – Repeat every third year thereafter**

After completing verification for a building owner, they likely will not need your verification services until the next year verification is due (see earlier chart). However, your building owner may appreciate an annual check-in to see if they need help in the interim years with benchmarking and reporting their annual data.

### **Who should I contact with questions?**

For questions about the Portfolio Manager tool, such as how to set up a property or add energy bill information, contact [ENERGY STAR](#) directly using their Help Desk support.

For questions about the Benchmarking Law requirements, how to complete verification, and how to report data to DEP, contact DEP via email ([energy@montgomerycountymd.gov](mailto:energy@montgomerycountymd.gov)) or by phone (240-777-7754).